



Sole Source Request Form

Sole Source Bidsync 042-C030416-RT-SS

SECTION II – DEPARTMENT INFORMATION (Complete in its entirety)

| | | | |
|--|---|--|--|
| Department: Health Care Agency, Behavioral Health Agency, MHSA Innovation Projects | | Date: June 6, 2022 | |
| Vendor Name: Chorus Innovations, Inc. | | Sole Source BidSync Number: 04-C030416-RT-SS | |
| Is the above named vendor a retired employee of the County of Orange? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes", review and Approval is required from CEO Human Resource Services prior to contract execution. | | | |
| Contract Term (Dates): June 1, 2021 – June 30, 2024 | Is Agreement Grant Funded? Source 100% Mental Health Services Act (Prop 63) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | Percent Funded: Funding Proprietary? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| Contract Amount? \$17,000,500 for the term of the Agreement | | Is this renewable? If yes, how many years? Yes. Two | |
| Type of Request: <input type="checkbox"/> New <input type="checkbox"/> Multi-Year <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Amendment <input checked="" type="checkbox"/> Increase | | | |
| Renewal Year: June 1, 2024 – June 30, 2025 & June 1, 2025 – June 30, 2026 | | Did vendor provide a sole source affidavit? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes, please attach | |
| Board Date: July 26, 2022 | ASR Number: 22-000565 | If not scheduled to go to the Board explain why? Board approval is required per CPM, Section 4.5. | |
| Does Contract include Non-Standard Language? If yes, explain in detail. Yes, Article S-Confidentiality and Limitation of Liability | | | |
| Was Contract Approved by Risk Mgmt.? Yes, Risk management approved on 3/26/2021 | | Was Contract Approved by County Counsel? In Process | |
| Were any exceptions taken? If yes, explain in detail. Yes, Article S-Confidentiality and Limitation of Liability. | | | |
| <input checked="" type="checkbox"/> DPA certifies that they have read and verified that the information is true and satisfies the sole source requirements listed in the County Contract Policy Manual. | | | |
| <input type="checkbox"/> Solicitation Exemption <i>(For purchases with special circumstances, and/or when it is determined to be in the best interest of the County.)</i> | | | |



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SECTION III – SOLE SOURCE JUSTIFICATION

- 1. Provide a description of the type of contract to be established.** *(For example: is the contract a commodity, service, human service, public works, or other – please explain.) Attach additional sheet if necessary.*

This is services contract for the ongoing development, refinement, expansion and maintenance of a digital behavioral health resource navigation tool (i.e., OC Navigator).

- 2. Provide a detailed description of services/commodities and how they will be used within the department. If this is an existing sole source, please provide some history of its origination, Board approvals, etc.** *(This information may be obtained from the scope of work prepared by the County and the vendor's proposal that provides a detailed description of the services/supplies.) Attach additional sheet if necessary.*

In March 2020, HCA partnered with Chorus Innovations, Inc. through a Participation Agreement (PA) with the California Mental Health Services Authority (CalMHSA) to plan and develop a digital behavioral health resource navigation tool (i.e., OC Navigator). This effort is part of a time-limited Innovation project called Behavioral Health System Transformation. In June 2021, HCA executed a sole source contract with Chorus Innovations, Inc. to continue development locally rather than through CalMHSA, resulting in cost savings. To date, the project has connected with 182 individuals and 65 organizations in 31 workgroups and conducted 59 interviews to support the development of the OC Navigator. The OC Navigator began as a small-scale pilot in February 2021, and since its launch on April 7, 2022, through June 14, 2022, 8,000 total new and returning users to the OC Navigator site, with a total of 90,000 page views.

Rather than move into the maintenance phase as initially proposed in the existing contract, HCA proposes to continue development, expansion and refinement activities. The current request to amend the contract will increase the scope of work to the following types of activities:

- Continued implementation efforts:
 - Focus on curating and including resources tailored for additional target populations, including but not limited to, students, youth and families (efforts to date have focused on services and Resource Guides for Older Adults, Veterans, LGBT individuals, Housing/Shelter, HCA/County-funded/operated services)
 - Refine descriptions, translations, and updates to resources that are housed in the OC Navigator
 - Create additional Resource Guides



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- Continue building technology enhancements for HCA programs included in the Chorus platform (i.e., OC Links, mobile crisis assessment teams or CAT, BHS Outreach and Engagement, Crisis Stabilization Units, OC WarmLine, etc.) to further streamline their program workflows, creating increased operational efficiency
- Refine dashboarding and reporting
- Increased scope of work:
 - Enhance and expand coordination of HCA's Crisis Services System of Care to include but not be limited to:
 - Inpatient electronic Treatment Authorization Requests for inpatient psychiatric hospitalization
 - Electronic census of bed availability across HCA's crisis residential services providers
 - Data integration, when permitted, across crisis services programs to facilitate client care
 - Expand and refine service navigation
 - Build the closed-loop referral workflow, which has been put on pause in the design stage due, in part, to lack of funding
 - Client-based consent for sharing across providers
 - Referral and linkage reporting per MHSA Prevention and Early Intervention Regulations
 - Development of native mobile application for the OC Navigator
 - Build Substance Use Disorder (SUD) services
 - ASAM screening and placement
 - Electronic census of bed availability across HCA's SUD residential services providers
 - Continue progress on integration with IRIS/EHR

- 3. Explain why the recommended vendor is the only one capable of providing the required services and/or commodities. How did you determine this to be a sole source and what specific steps did you take? Please list all sources that have been contacted and explain in detail why they cannot fulfill the County's requirements. Include vendor affidavit and/or other documentation which supports your sole source.** *(Responses will include strong programmatic and technological information that supports the claim that there is only one vendor that can provide the services and/or commodities. Your response will include information pertaining to any research that was conducted to establish that the vendor is a sole source, include information pertaining to discussions with other potential suppliers and why they were no longer being considered by the County.) Attach additional sheet if necessary.*

Chorus Innovations, Inc. is the only vendor that can provide the deliverables and increased scope of work noted above in a timely, cost efficient, and seamless process. They have years of experience and have demonstrated through their past performance their ability to work directly with Orange County stakeholders. They also have extensive knowledge of the inner workings of HCA Programs and workflows, security clearance from HCA IT, and a host platform



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that supports the daily operations of multiple HCA programs.

The technical development of the features, functionality and design work of the OC Navigator have been in progress between HCA and Chorus Innovations, Inc. since March 2020. As mentioned above, HCA initially executed a PA with CalMHSA for the development of the OC Navigator. This PA allowed HCA to leverage the subject matter expertise and digital resources within the Help@Hand project, a cross-county collaborative in which Orange County is participating, and in which CalMHSA serves as the fiscal intermediary. HCA was able to use vendors identified and vetted through the Request for a Statement of Qualifications (RFSQ) executed by CalMHSA to procure technology vendors qualified for the Help@Hand project. Chorus Innovations, Inc. was the only vendor identified through this RFSQ qualified to deliver the scope of work for the OC Navigator.

In 2019, HCA also independently interviewed another vendor offering a similar resource navigation support platform, 1degree.org, that had not responded to the CalMHSA RFSQ. The company declined to consider submitting a quote to customize their existing platform for the OC Navigator project because the vendor would not be willing to include resources and services provided or funded by commercial insurance carriers or for-profit entities. At the time, no other digital resource navigation platforms were identified that offered some of the key elements proposed for the OC Navigator (i.e., curated list of resources, optional social determinants of health survey, resources updated in real-time, etc.). As such, CalMHSA executed a contract with Chorus Innovations, Inc. for the OC Navigator.

HCA's PA with CalMHSA for the OC Navigator expired on May 31, 2021; and on June 1, 2021, HCA executed a sole source contract with Chorus Innovations, Inc. (MA-042-21011323) to maintain continuity in community stakeholder engagement and feedback and technical development and refinement. A phased rollout of the OC Navigator began with a small-scale pilot in February 2021, followed by progressive community-based use, culminating in a major promotional campaign launched through HCA's partnership with Angels Baseball in April 2022. Chorus Innovations, Inc. continues to refine and expand features to ensure platform stability during large spikes in simultaneous users and to improve user adoption, accessibility and use. During this contract term, Chorus Innovations, Inc. also transitioned several HCA county and county-contracted programs (i.e., OC Links, mobile Crisis Assessment Teams, OC WarmLine, BHS Outreach and Engagement) into the Chorus platform to improve program operations and efficiency. The vendor has also passed HCA IT's security vetting for HIPAA Compliance and recently began working on integrating with the HCA/MHRS EHR.

4. How does recommended vendor's prices or fees compare to the general market? Attach quotes for comparable services or supplies. Attach additional sheet if necessary.

There are no others to compare to as Chorus Innovations Inc. operates with a business model of active co-creation and feedback from the general community members and clients of services,



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and the development of the technology product, rather than limiting development of technology specification to the business customer.

5. If the recommended vendor was not available, how would the County accomplish this particular task?

Attach additional sheet if necessary.

If the recommended vendor was not available, HCA would experience a critical disruption to the operations of its mental health crisis response and support system and to the care of HCA clients and Orange County residents. HCA would need to pause all work on the ongoing development and refinement activities to identify another technology vendor with a flexible platform that can seamlessly transition and host the OC Navigator website. The existing marketing efforts for the OC Navigator would need to be paused during the transition period to prevent redirecting Orange County residents to a suspended resource tool, likely disrupting their access to needed behavioral health services and supports.

In addition, Chorus Innovations, Inc. supports several HCA programs on its platform, three of which operate 24/7 365 days a year to provide on-demand support to callers (i.e., OC Links, mobile crisis assessment teams, OC WarmLine, the latter of which is in final stages of transition to the Chorus platform).

6. Please provide vendor history – name change, litigation, judgments, aka, etc. for the last 7 years.

Through the normal County of Orange vetting process, Chorus Innovations, Inc., has no changes, litigation or judgements on public record within the last 7 years

7. If vendor is a retired, former employee, has the vendor previously been rehired as a contractor within the last three years? ☐ Yes ☒ No

If yes, provide explanation/support for hiring the retired, former employee as a vendor and provide contract dates, scope of work, and total amounts paid under each contract.

8. Explain (in detail) why a request for Solicitation Exemption is needed. (Only applicable for Solicitation Exemption)

Attach additional sheet if necessary.

N/A



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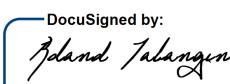
SECTION IV – AUTHOR/REQUESTOR

| | | |
|--|---------------------------------------|--------------------|
| Signature:  DocuSigned by: Flor Yousefian Tehrani B7E5258DD30B40D | Print Name: Flor Yousefian Tehrani | Date: 6/27/2022 |
|--|---------------------------------------|--------------------|

SECTION V – CEO Human Resource Services APPROVAL (Review and approval is required when vendor is a Retired, Former Employee.)

| | | |
|------------|-------------|-------|
| Signature: | Print Name: | Date: |
|------------|-------------|-------|

SECTION VI – DEPUTY PURCHASING AGENT CONCURRENCE

| | | |
|--|--------------------------------|--------------------|
| Signature:  DocuSigned by: Roland Tabangin DFC5210F9D794C8... | Print Name: Roland Tabangin | Date: 6/27/2022 |
|--|--------------------------------|--------------------|

SECTION VII – DEPARTMENT HEAD APPROVAL

| | | |
|--|-----------------------------|--------------------|
| Signature:  DocuSigned by: Dr. Clayton Chau AFEE619990EB464... | Print Name: Clayton Chau | Date: 6/27/2022 |
|--|-----------------------------|--------------------|

SECTION VIII – COUNTY PROCUREMENT OFFICE

Prior to execution of a contract, the County Procurement Officer or designee shall approve All Sole Source requests for Commodities that exceed \$250,000, Capitol Assets and services exceeding \$75,000, and All other Sole Source requests that require Board approval despite the amount. Approvals are obtained electronically through the County's online bidding system.

SOLICITATION EXEMPTION – CEO USE ONLY:

| | | | |
|--|--|--|--|
| Board of Supervisor Notification Date: | | | |
| Comments: | | | |
| | | | |
| CPO: <input type="checkbox"/> Approved <input type="checkbox"/> Denied | | CFO: <input type="checkbox"/> Approved <input type="checkbox"/> Denied | |
| | | | |
| CPO Authorized Signature: | | CFO Authorized Signature: | |
| Date: | | Date: | |

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Release Bid Workflow

Name: Roland Tabangin
Phone: 714-834-3151
Email: rtabangin@ochca.com
Status: Submitter Jun 28, 2022 4:53:02 AM PDT



Bid Information

Bid Number:

[042-C030416-RT-SS](#)

Bid Title:

Behavioral Health System Transformation (BHST)
OC Navigator

Status

Status:

Approved

[View Workflow History](#)

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